

DNA Diagnostics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology (PCR-based Diagnostics, NGS DNA Diagnosis, In-Situ Hybridization Diagnostics, Microarrays-based Diagnostics, Other Technologies), By Application (Cancer Genetics Tests, Infectious Diseases DNA Testing, Newborn Genetic Screening, Preimplantation & Reproductive Diagnosis, Non-Infectious Diseases DNA Testing, Newborn Genetic Screening, Preimplantation & Reproductive Diagnosis, Non-Infectious Diseases DNA Testing), By Region and Competition, 2019-2029F

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Abstracts

Global DNA Diagnostics Market was valued at USD 10.59 Billion in 2023 and is expected to reach USD 14.29 Billion by 2029 with a CAGR of 5.29% during the forecast period.

The Global DNA Diagnostics Market is experiencing significant growth due to advancements in molecular biology and an increasing focus on precision medicine. DNA diagnostics involve the identification and analysis of genetic material to diagnose a wide range of conditions, including genetic disorders, infectious diseases, and cancers. Key factors driving market expansion include rising awareness of personalized healthcare, growing demand for non-invasive diagnostic methods, and the increasing prevalence of chronic diseases and hereditary conditions. Technological innovations

such as next-generation sequencing (NGS), polymerase chain reaction (PCR), and microarrays are enhancing the accuracy and speed of genetic testing, which is further fueling market growth.

The market is also benefiting from the increasing adoption of DNA diagnostics in prenatal testing, oncology, and pharmacogenomics. In addition, the COVID-19 pandemic accelerated the demand for advanced diagnostic solutions, as DNA-based technologies played a crucial role in virus detection and vaccine development. Initiatives by governments and healthcare organizations worldwide to integrate genetic testing into routine clinical practice are creating new opportunities for market players.

Despite these promising trends, challenges such as high costs associated with DNA-based diagnostic tools and the complexity of interpreting genetic data may hinder growth. Regulatory hurdles and ethical concerns related to genetic testing remain important considerations for the industry. The Global DNA Diagnostics Market is expected to continue its upward trajectory, driven by increased investments in genetic research, expanding applications in clinical diagnostics, and a growing emphasis on early disease detection and prevention.

Key Market Drivers

Increasing Prevalence of Genetic and Chronic Diseases

The increasing prevalence of genetic and chronic diseases is a significant driver for the growth of the Global DNA Diagnostics Market. Diseases such as cancer, cardiovascular conditions, and diabetes often have underlying genetic components, making DNA testing a critical tool in the early detection, diagnosis, and personalized treatment of these ailments. For instance, in oncology, DNA diagnostics are utilized to detect specific genetic mutations within cancer cells. By identifying these mutations, healthcare providers can tailor treatment plans, offering more precise and effective therapies. This personalized approach not only enhances treatment outcomes but also minimizes unnecessary side effects for patients. In April 2023, a significant nationwide study has enabled approximately 5,500 individuals with severe developmental disorders to identify the genetic causes of their conditions, contributing to advancements in global diagnostic practices. The Deciphering Developmental Disorders (DDD) study involved over 13,500 families from 24 regional genetics services across the UK and Ireland. This initiative, a collaboration between the NHS and the Wellcome Sanger Institute, is funded by Wellcome and the Department of Health and Social Care, with support from the National Institute for Health and Care Research. The insights gained from this study

underscore the increasing demand for DNA diagnostics in improving patient care and enhancing diagnostic accuracy worldwide.

DNA diagnostics are playing a crucial role in cardiovascular disease management. Genetic testing helps identify individuals predisposed to hereditary cardiovascular conditions, such as familial hypercholesterolemia, enabling earlier interventions and preventive strategies. This early identification is instrumental in reducing the risk of severe complications, such as heart attacks or strokes, through timely medical intervention.

The global burden of chronic diseases is driving healthcare systems to adopt advanced diagnostic techniques, including DNA-based tests. These tests provide deeper insights into disease mechanisms, allowing for more informed treatment decisions and improved patient outcomes. The integration of DNA diagnostics into routine healthcare is becoming increasingly essential as populations age and the incidence of chronic conditions continues to rise. Growing awareness about genetic predispositions to various diseases is encouraging more individuals to undergo genetic testing as part of their regular health assessments. As people become more proactive in managing their health, DNA diagnostics are gaining traction as a vital component of preventative care. Consequently, the global demand for DNA-based diagnostics is projected to rise substantially, driven by both the increasing disease burden and the shift towards more personalized, precision medicine approaches.

Technological Advancements in Genetic Testing Tools

The Global DNA Diagnostics Market is being propelled by significant technological advancements in genetic testing tools, such as next-generation sequencing (NGS), polymerase chain reaction (PCR), and microarray technologies. These innovations have revolutionized the field of DNA diagnostics by enhancing accuracy, speed, and affordability, making it more accessible for healthcare professionals to diagnose a wide array of genetic conditions. One of the most transformative technologies, NGS, enables the simultaneous sequencing of millions of DNA strands, providing detailed genetic insights at a much faster rate than traditional methods. This capability is particularly valuable in diagnosing complex diseases such as cancer and rare genetic disorders, where identifying specific genetic mutations is essential for precise treatment planning. NGS has also expanded the scope of genetic research, allowing for the discovery of new biomarkers and therapeutic targets, further driving personalized medicine initiatives.

PCR technology, another cornerstone of genetic testing, has revolutionized the amplification of genetic material. It allows for the detection of even minute quantities of DNA, which is especially critical in identifying infectious agents, such as viruses and bacteria, and detecting genetic mutations associated with various diseases. Its high sensitivity and rapid processing time have made PCR a standard tool in both clinical and research settings. In February 2023, Thermo Fisher Scientific launched real-time PCR kits in India for the detection of infectious diseases, responding to the growing demand within the DNA diagnostics market. The Applied Biosystems TaqPath PCR kits target infections like Multi-Drug Resistant Tuberculosis (MTB MDR), Hepatitis B (HBV), Hepatitis C (HCV), and Human Immunodeficiency Virus (HIV), as well as genetic analysis for HLA B27. These kits, approved by the Central Drugs Standard Control Organisation (CDSCO), will be produced in collaboration with Mylab Discovery Solutions, enhancing diagnostic capabilities in the region.

Advancements in microarray technology, particularly in terms of miniaturization and automation, have made high-throughput genetic testing more cost-effective and accessible. Microarrays allow for the simultaneous analysis of thousands of genetic markers, facilitating large-scale studies and enabling clinicians to test for multiple conditions in a single assay. This has significantly reduced the time and cost involved in genetic testing, making it more feasible for routine healthcare use. As these technologies continue to evolve, the scope of DNA diagnostics is expected to expand, allowing for the diagnosis of an even broader range of conditions. The ongoing development of more sophisticated, faster, and user-friendly tools is likely to further accelerate market growth and drive the integration of DNA-based diagnostics into mainstream healthcare.

Growing Demand for Personalized Medicine

The growing demand for personalized medicine is a significant driver for the Global DNA Diagnostics Market. Personalized medicine focuses on tailoring medical treatments to the unique characteristics of each patient, with particular attention to their genetic profile. DNA diagnostics are at the heart of this approach, enabling healthcare providers to understand the genetic basis of diseases and customize treatments accordingly. In oncology, for instance, DNA testing is instrumental in identifying specific mutations within cancer cells that make tumors responsive to certain drugs. This allows clinicians to select targeted therapies that are more effective against a patient's particular type of cancer, reducing the likelihood of ineffective treatments and minimizing side effects. This targeted approach not only improves patient outcomes but also enhances the overall efficiency of cancer care.

Pharmacogenomics, another area of personalized medicine, uses DNA diagnostics to predict how individual patients will respond to specific medications. Variations in genetic makeup can influence how a person metabolizes drugs, which can lead to differences in drug efficacy and potential adverse reactions. By utilizing genetic testing, healthcare providers can determine the most appropriate medications for each patient, optimizing treatment outcomes and reducing the risk of harmful side effects.

The growing focus on personalized healthcare is also transforming disease management in areas such as cardiovascular diseases, autoimmune disorders, and infectious diseases. DNA diagnostics allow for earlier detection, more precise diagnosis, and tailored interventions, all of which contribute to improved patient care. The ability to identify at-risk individuals based on their genetic profile is particularly valuable for preventive healthcare, enabling early interventions that can mitigate the onset of serious conditions. As the medical field continues to prioritize individualized treatment strategies, the demand for DNA diagnostics is expected to rise. More healthcare providers are adopting personalized approaches to disease management, and the integration of DNA-based testing into routine clinical practice is becoming more widespread. This trend is likely to drive substantial growth in the Global DNA Diagnostics Market as personalized medicine evolves and expands.

Key Market Challenges

High Costs Associated with DNA Diagnostics

High costs associated with DNA diagnostics represent a significant challenge for the Global DNA Diagnostics Market. Despite remarkable advancements in technology that have enhanced the accuracy and speed of genetic testing, the financial burden on patients and healthcare providers remains substantial. Tests such as next-generation sequencing (NGS) and whole-genome sequencing can be prohibitively expensive, particularly in regions where healthcare coverage for these services is limited or nonexistent. In developed markets, while insurance may cover a portion of the testing costs, patients often face considerable out-of-pocket expenses. This can deter individuals from seeking necessary genetic tests, especially those who might benefit from early diagnosis or personalized treatment options. The financial implications extend beyond patients; healthcare providers are also affected by the high costs of reagents, specialized equipment, and trained personnel needed to perform DNA diagnostics. These financial barriers create hesitation among providers to adopt DNA testing for all patients, even when the clinical benefits are evident.

In low- and middle-income countries, the high cost of DNA diagnostics further exacerbates the issue. Healthcare systems in these regions often lack the resources to incorporate routine genetic testing, limiting access to life-saving technologies. The cumulative effect of these cost-related challenges can slow market growth and restrict the widespread adoption of DNA diagnostics, ultimately impacting the potential for improved patient outcomes in various healthcare settings. Addressing these financial barriers will be crucial for enhancing access to DNA diagnostics and fostering market expansion in the coming years.

Complexity in Interpreting Genetic Data

Another significant challenge facing the Global DNA Diagnostics Market is the complexity involved in interpreting genetic data. While DNA diagnostics provide valuable insights into a patient's genetic makeup and potential health risks, translating these results into actionable clinical decisions can prove difficult. Genetic testing often generates vast amounts of data, much of which remains incompletely understood or classified, particularly regarding the significance of specific genetic variants.

The presence of variants of unknown significance (VUS) complicates matters for clinicians, as there may be insufficient information to determine whether a particular variant is harmful or benign. This uncertainty can lead to ambiguous results, making it challenging for healthcare providers to deliver definitive diagnoses or formulate effective treatment plans. The complexity of interpreting genetic data demands highly specialized knowledge, which is in short supply; there are currently insufficient professionals, such as genetic counselors and clinical geneticists, trained to analyze and elucidate these results. This shortage exacerbates the difficulty of integrating DNA diagnostics into routine clinical practice, particularly in regions where access to genetic experts is limited. As the demand for DNA diagnostics grows, addressing these complexities in genetic data interpretation is essential. This involves not only improving educational programs to train more genetic specialists but also developing standardized guidelines for interpreting genetic data. By enhancing the interpretative capabilities of healthcare providers, the market can ensure that DNA diagnostics are utilized effectively and with confidence, ultimately improving patient care and health outcomes.

Key Market Trends

Rising Application of DNA Diagnostics in Infectious Disease Detection

The rising application of DNA diagnostics in infectious disease detection is transforming the way healthcare systems address the diagnosis and management of infections. The demand for accurate, rapid, and reliable diagnostic tools has grown exponentially, particularly in response to global health crises such as the COVID-19 pandemic. DNA-based technologies, such as polymerase chain reaction (PCR) and next-generation sequencing (NGS), have proven invaluable in detecting and monitoring infectious agents, including viruses, bacteria, and fungi.

PCR, for instance, has become a cornerstone in the identification of pathogens due to its ability to amplify tiny amounts of DNA, allowing for the detection of infectious agents even in the earliest stages of infection. This technology is highly sensitive and can detect genetic material even when traditional methods, such as cultures, may fail due to low pathogen load or the slow-growing nature of certain organisms. Similarly, NGS allows for comprehensive sequencing of pathogen genomes, enabling precise identification of infections and the ability to track the evolution of diseases at the molecular level. These advancements provide faster results, facilitating timely interventions and improving patient outcomes.

The ability to identify specific genetic markers of pathogens offers a more targeted approach to treatment. For example, DNA diagnostics can differentiate between bacterial and viral infections, which helps reduce the misuse of antibiotics and the subsequent rise of antimicrobial resistance. This precision minimizes unnecessary treatments and enables healthcare providers to administer the most appropriate therapeutic interventions. The growing incidence of infectious diseases, including emerging and re-emerging pathogens, has underscored the need for rapid and accurate diagnostics, particularly in public health emergencies. The development of portable, point-of-care DNA diagnostic devices is further enhancing access to testing, particularly in remote and underserved regions. These mobile solutions allow for the early detection and containment of diseases in areas where laboratory infrastructure is limited, contributing to better public health outcomes and driving market growth for DNA diagnostics in infectious disease detection.

Increased Focus on Prenatal and Neonatal Genetic Testing

The growing focus on prenatal and neonatal genetic testing is emerging as a key driver for the Global DNA Diagnostics Market. These tests play a crucial role in identifying genetic abnormalities in fetuses and newborns, enabling early diagnosis and management of congenital disorders. Prenatal DNA diagnostics, particularly non-invasive prenatal testing (NIPT), have gained significant traction due to their ability to

detect chromosomal abnormalities, such as Down syndrome, with high accuracy and minimal risk to both the mother and fetus. NIPT analyzes cell-free fetal DNA circulating in the mother's blood, offering a safer alternative to traditional invasive methods like amniocentesis, which carry a higher risk of complications.

In neonatal care, DNA diagnostics are instrumental in screening newborns for a wide array of genetic disorders, including cystic fibrosis, metabolic disorders, and other hereditary conditions that may not present immediate symptoms but could have serious long-term health consequences. Early detection through DNA testing allows healthcare providers to implement timely interventions, significantly improving health outcomes. For instance, early treatment of metabolic disorders can prevent severe developmental delays or life-threatening complications. In some cases, such early detection and treatment can be life-saving.

The rising awareness among parents and healthcare providers about the importance of early genetic screening is fueling demand for these services. With more parents seeking reassurance about their child's health and the potential for early interventions, prenatal and neonatal DNA diagnostics are becoming a routine part of prenatal care in many regions. The increasing availability of these tests in clinical settings, coupled with growing consumer interest, is driving market expansion.

Technological advancements in genetic testing, such as improved sequencing techniques and automated platforms, are making these tests more accessible and affordable. As costs decrease and testing becomes more widespread, a greater number of healthcare providers and patients are opting for DNA diagnostics, further contributing to market growth. The expanding focus on early diagnosis through prenatal and neonatal genetic testing is expected to remain a strong force behind the growth of the DNA diagnostics market.

Segmental Insights

Technology Insights

Based on the Technology, In the Global DNA Diagnostics Market, PCR-based diagnostics (Polymerase Chain Reaction) dominated due to their widespread adoption and versatility. PCR technology enables the amplification of specific DNA sequences, making it an essential tool for various applications, including infectious disease detection, genetic disorder diagnosis, and cancer profiling. Its rapid turnaround time and high sensitivity allow for early and accurate disease detection, which is crucial in clinical

settings. The PCR-based segment is favored for its ability to deliver results quickly, often within hours, which is critical in time-sensitive situations like diagnosing infectious diseases such as COVID-19. Advancements in PCR technology, such as real-time PCR (qPCR) and multiplex PCR, enhance its efficiency and allow simultaneous detection of multiple targets. This flexibility is highly valued in both research and clinical laboratories.

The scalability of PCR technology makes it suitable for various laboratory settings, from small clinics to large hospitals, further driving its adoption. The ongoing development of automated PCR systems is also streamlining workflows and minimizing human error, which enhances overall accuracy and reliability. The increasing demand for personalized medicine and targeted therapies in oncology is propelling the use of PCR-based diagnostics, as they provide critical information needed to tailor treatment plans.

Application Insights

Based on the Application segment, In the Global DNA Diagnostics Market, Infectious Diseases DNA Testing dominated, driven by the increasing prevalence of infectious diseases and the growing need for rapid and accurate diagnostic methods. This segment has gained significant traction due to its pivotal role in the early detection and management of various infectious diseases, including viral, bacterial, and parasitic infections. The COVID-19 pandemic highlighted the importance of timely diagnostics, leading to a surge in the adoption of DNA-based testing methods such as PCR and real-time PCR for infectious agents. Infectious diseases DNA testing is favored for its ability to provide quick results, often within hours, which is crucial for implementing effective treatment strategies and controlling outbreaks. The technological advancements in PCR and next-generation sequencing (NGS) have enhanced the sensitivity and specificity of these tests, making them indispensable in clinical laboratories. The rise in global health initiatives aimed at improving infectious disease surveillance and response has further propelled the growth of this application segment. While other applications, such as cancer genetics tests and newborn genetic screening, are also essential, the immediate need for effective infectious disease management keeps the infectious diseases DNA testing segment at the forefront of the DNA diagnostics market.

Regional Insights

In the forecast period, North America was anticipated to dominate the Global DNA Diagnostics Market. This leadership can be attributed to several factors, including advanced healthcare infrastructure, high levels of research and development (R&D) investment, and a strong emphasis on personalized medicine. The United States, in

particular, boasts a well-established regulatory framework that supports innovation and rapid commercialization of DNA diagnostic technologies. The increasing prevalence of genetic disorders and cancer in North America has heightened the demand for accurate and timely diagnostic solutions. The region is home to leading biotechnology and pharmaceutical companies that are actively involved in the development of cutting-edge DNA diagnostic tests. This focus on innovation is reinforced by substantial funding for genomics research from both public and private sectors, driving advancements in technologies such as next-generation sequencing (NGS) and polymerase chain reaction (PCR).

The presence of a highly skilled workforce, including genetic counselors and molecular biologists, enhances the capacity for DNA testing and interpretation. Public health initiatives aimed at improving access to genetic testing and increasing awareness of its benefits also contribute to market growth in this region. Partnerships between healthcare providers, research institutions, and industry players are fostering the development of new diagnostic tools and expanding the availability of genetic testing services. As these collaborations continue to evolve, they will further solidify North America's position as the leading region in the DNA diagnostics market.

Key Market Players

Abbott Laboratories Inc

F. Hoffmann-La Roche Ltd.

QIAGEN NV

Bio-Rad Laboratories, Inc.

Thermo Fisher Scientific, Inc.

Illumina, Inc.

Hologic, Inc.

Agilent Technologies Inc.

Siemens Healthineers AG

Danaher Corporation

Report Scope:

In this report, the Global DNA Diagnostics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

DNA Diagnostics Market, By Technology:

PCR-based Diagnostics

NGS DNA Diagnosis

In-Situ Hybridization Diagnostics

Microarrays-based Diagnostics

Other Technologies

DNA Diagnostics Market, By Application:

Cancer Genetics Tests

Infectious Diseases DNA Testing

Newborn Genetic Screening

Preimplantation & Reproductive Diagnosis

Non-Infectious Diseases DNA Testing

Newborn Genetic Screening

Preimplantation & Reproductive Diagnosis

Non-Infectious Diseases DNA Testing

DNA Diagnostics Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global DNA Diagnostics Market.

Available Customizations:

Global DNA Diagnostics Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

4. VOICE OF CUSTOMER

5. GLOBAL DNA DIAGNOSTICS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Technology (PCR-based Diagnostics, NGS DNA Diagnosis, In-Situ Hybridization Diagnostics, Microarrays-based Diagnostics, Other Technologies)
 - 5.2.2. By Application (Cancer Genetics Tests, Infectious Diseases DNA Testing, Newborn Genetic Screening, Preimplantation & Reproductive Diagnosis, Non-Infectious

Diseases DNA Testing, Newborn Genetic Screening, Preimplantation & Reproductive Diagnosis, Non-Infectious Diseases DNA Testing)

5.2.3. By Company (2023)

5.2.4. By Region

5.3. Market Map

6. NORTH AMERICA DNA DIAGNOSTICS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Technology

6.2.2. By Application

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States DNA Diagnostics Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Technology

6.3.1.2.2. By Application

6.3.2. Mexico DNA Diagnostics Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Technology

6.3.2.2.2. By Application

6.3.3. Canada DNA Diagnostics Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Technology

6.3.3.2.2. By Application

7. EUROPE DNA DIAGNOSTICS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

- 7.2.1. By Technology
- 7.2.2. By Application
- 7.2.3. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France DNA Diagnostics Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Technology
 - 7.3.1.2.2. By Application
 - 7.3.2. Germany DNA Diagnostics Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Technology
 - 7.3.2.2.2. By Application
 - 7.3.3. United Kingdom DNA Diagnostics Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Technology
 - 7.3.3.2.2. By Application
 - 7.3.4. Italy DNA Diagnostics Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Technology
 - 7.3.4.2.2. By Application
 - 7.3.5. Spain DNA Diagnostics Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Technology
 - 7.3.5.2.2. By Application

8. ASIA-PACIFIC DNA DIAGNOSTICS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Technology

8.2.2. By Application

8.2.3. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China DNA Diagnostics Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Technology

8.3.1.2.2. By Application

8.3.2. India DNA Diagnostics Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Technology

8.3.2.2.2. By Application

8.3.3. South Korea DNA Diagnostics Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Technology

8.3.3.2.2. By Application

8.3.4. Japan DNA Diagnostics Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Technology

8.3.4.2.2. By Application

8.3.5. Australia DNA Diagnostics Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Technology

8.3.5.2.2. By Application

9. SOUTH AMERICA DNA DIAGNOSTICS MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Technology
 - 9.2.2. By Application
 - 9.2.3. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil DNA Diagnostics Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Technology
 - 9.3.1.2.2. By Application
 - 9.3.2. Argentina DNA Diagnostics Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Technology
 - 9.3.2.2.2. By Application
 - 9.3.3. Colombia DNA Diagnostics Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Technology
 - 9.3.3.2.2. By Application

10. MIDDLE EAST AND AFRICA DNA DIAGNOSTICS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Technology
 - 10.2.2. By Application
 - 10.2.3. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa DNA Diagnostics Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Technology

- 10.3.1.2.2. By Application
- 10.3.2. Saudi Arabia DNA Diagnostics Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Technology
 - 10.3.2.2.2. By Application
- 10.3.3. UAE DNA Diagnostics Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Technology
 - 10.3.3.2.2. By Application

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. PORTERS FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

- 14.1. Abbott Laboratories Inc.
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services

- 14.1.4. Financials (As Reported)
- 14.1.5. Recent Developments
- 14.1.6. Key Personnel Details
- 14.1.7. SWOT Analysis
- 14.2. F. Hoffmann-La Roche Ltd.
- 14.3. QIAGEN NV
- 14.4. Bio-Rad Laboratories, Inc.
- 14.5. Thermo Fisher Scientific, Inc.
- 14.6. Illumina, Inc.
- 14.7. Hologic, Inc.
- 14.8. Agilent Technologies Inc.
- 14.9. Siemens Healthineers AG
- 14.10. Danaher Corporation

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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